



FINANCIAL SYSTEMS INITIATIVES AT BERKELEY LAB

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FMSIC All-Contractors Meeting

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Current Systems

- PeopleSoft General Ledger and Projects 7.5 E&G (9/97)
- PeopleSoft Billing and Receivables 7.5 E&G (6/00)
- PeopleSoft Purchasing and Payables 7.5 E&G (8/02)
- PeopleSoft eProcurement 8.1 (8/02)
- Inventory: MRO Maximo (10/96)
- Fixed Asset: Annams Sunflower Assets (10/98)
- In-house systems for Budgeting, Travel, Sponsored Projects, Systems Contracts, Procurement Card



PRP Implementation

(Purchasing, Receiving, Payables)



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- LBNL's largest systems initiative in FY2002.
- Implemented PeopleSoft eProcurement, Purchasing, and Payables.
- Replaced a mainframe Accounts Payable system and an obsolete Oracle Purchasing system.
- Went live in August 2002.



PRP Process Improvements

- Web-based requisitioning
- Parallel rule-based requisition approvals for project managers, Budget, and EH&S
- Simple e-mail workflow for requisition approvals
- On-line receiving
- Single, shared database between Purchasing and A/P



PRP Process Improvements

- E-mail-based invoice certification process
- Fully automated 1099 process
- Recurring vouchers and recurring journals
- “Speedchart” templates for voucher entry
- Integration with other institutional financial systems
- Vastly enhanced information accessibility



PeopleSoft Performance Tuning

Obvious.... or not?



PeopleSoft Tuning

- 1997: Initial emphasis was on implementing system and achieving acceptable performance levels.
- Hardware acquisitions kept pace with added systems and increased data volumes.
- May 2002: Upgraded to new database version (Oracle 8.1.7.1) and not happy with performance.
- August 2002: Hired a database tuning consultant to perform a “health check” of our PeopleSoft financials and make database tuning recommendations.



Tuning (continued)

- Since then, have implemented several recommendations.
- Not simple; one recommendation required a lengthy shutdown and rebuild.
- So far: have achieved 30% - 40% batch run time reductions.
- (Equivalent to 43% - 67% increased throughput.)
- We think we can still achieve significant additional gains.
- Caveat: Requires increased sophistication and ongoing management.
- Bottom line: Database tuning can be a powerful means for maximizing investment and postponing or avoiding expenses for more hardware.